

# SERVICE MARKETING DEVELOPMENT INVOLVING TOTAL QUALITY MANAGEMENT USING ICONIZATION, MIND MAPPING PRINCIPLES AND MATRIX METHODOLOGY

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## ABSTRACT

We have ascertained that often a service marketing plan in the boardroom and in the classroom is most often not understood by everyone, and in fact the contribution and involvement of the key players from the necessary variety of disciplines in the corporation is not there. Most often the final plan is not understood by everyone (even the final consumer). A goal for the marketing plan or product is that the plan must be innovative, creative, and have a consistent presentation for review by all members of the service group. The concept of Total Quality Management (TQM) emphasizes that for every customer activity there will be no other acceptance than total quality customer satisfaction.

Our goal for the service marketing environment is to utilize the concepts of systems analysis and creative thinking in combination with brainstorming tools (Arnold 1992) to involve the organization in assisting the marketing personnel to understand the business, to make evident the variety of clients that the business services and their expectations, and then to devise marketing strategies that will drive the corporation to exceed customer expectations, as well as to attract new clients to use the services.

In this paper, a methodology that has been created over 10 years in a large home health care corporation, and in a university computer science/business administration program is presented. The historical steps that led to its development will be described, along with the algorithm for implementing the methodology. This methodology consists of: matrix brainstorming for the partitioning and description of the customer base and for the determination of their expectations; understanding and brainstorming how these clients perceive the services and what their expectations are; and then finally, synthesizing the many ideas into a coherent marketing plan using a mind map.

## BACKGROUND

Motivation for the technique was derived from the needs of two diverse groups. In a graduate database

class and systems analysis class at Brandon University, students are involved yearly in a real life project to computerize a small business where there is no standard software to meet the small business's needs. The analyst must describe the activities of the business, understand the business, interact with the users to gain a thorough understanding of the business (so as to clearly describe the way the business is to be operated), optimize the way that this business is conducted, and then write the software to implement what has been learned. Some of the tools are described in Senn (1989). Of particular interest to this paper, is a matrix analysis method used to determine for example, who the potential users of the software are in the corporation. This methodology will be extended to facilitate the understanding of the needs and focus of the marketing plan.

In one project, these students were required to understand and model the operations of a large home health care corporation in the service industry (We Care Health Services Inc.) and to describe what this corporation's information processing needs were. Essentially, the business falls in the category of a temporary help business; that is, it utilizes registered nurses, licensed practical nurses, sitters, companions, homemakers, housekeepers and a variety of other care providers to service clients on a temporary basis.

The challenge on the corporate side was to create a marketing strategy that was coherent given the company's many different services. In the standard systems analysis method, we focus on what the business does or expects to do from a transaction point of view. From a marketing point of view, we must not only understand what the business does, but also understand what the expectations of the company's current and potential clients are so that the marketing plan can address these issues. One of the authors (McMaster 1978) was asked to review the software division of Apple Computer Corporation. One of his findings, in addition to a misallocation of a hardware person to the software division, was that the marketing division would drive the software development. It is evident to the authors that if a thorough analysis is done of the business by

the marketing personnel in a similar manner to that done in systems analysis, that the resulting information can also drive the enhancements to the way the service business offers its services. An essential ingredient in the marketing process described here is a structuring of the brainstorming technique described extensively in the literature and in particular in Wenger (1992). One of the challenges is to come up with a large number of ideas, and the authors have found that using the process dissection method (to be described), and client identification using the matrix methodology, facilitates the brainstorming process in that the user is required to think of the problem from many diverse points of view as a result of the partitioning processes. After clients have been described, and sample client servicing processes have been dissected, the marketing team has a rich understanding of the business, and innovative ideas for describing the business in a new or enhanced way for a better marketing result. The final step is to create a mind map that assists in synthesizing the many ideas into a coherent marketing strategy. The methodology may be summarized in the following steps.

### Marketing Plan Creation Algorithm

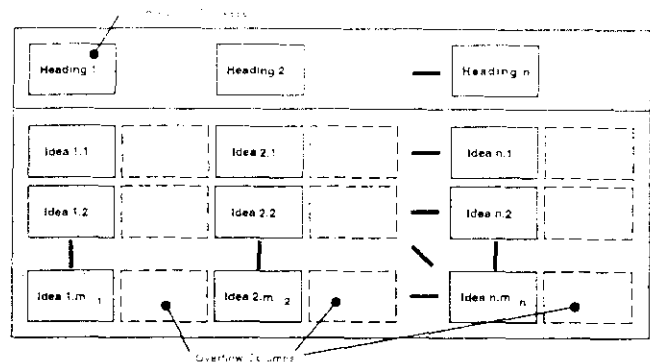
1. Using the matrix method, first determine the clients, then determine strategies, ideas and activities that describe and enhance the clients' experience and expectations.
2. Take a typical client transaction, and using the matrix method, dissect it and then describe how the client feels in each stage of the transaction and how one might market to them.
3. After Steps 1 and 2 are completed, the marketing planner (or director...) utilizes a mind map to create a marketing strategy. This will likely involve further brainstorming with the corporate groups (Matthews 1992).

### The Methodology

We will first extend the matrix methodology used in Senn (1989). A generalized form of the matrix appears in Figure 1.

The boxes in the matrix are 3" x 5" Post-it Notes™ that are then placed on a grid on a large white board. Boxes labelled "Idea #.#" are strategies, ideas, activities to describe the client experience, client expectations and ideas for how to make a client feel better

FIGURE 1

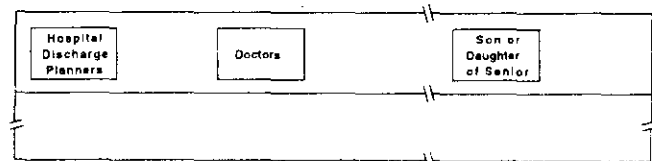


and to market to them. These ideas are derived in a brainstorming session with the marketers and key personnel in the corporation that can contribute to the process (less than 20 people is ideal). The number of headings should be 10 or less. If you create more heading items, then you are subdividing too finely or if you have say 17 headings, you might divide the process into two sections.

Now let us describe the marketing brainstorming session using this methodology.

In Step 1, the facilitator works with the group to first identify the customer categories. These are written on blue coloured Post-it Notes™ and placed in the heading portion. The facilitator should attempt to get all persons involved, and any idea offered should be stated out loud, and then written on a Post-it Notes™ by the contributor. This builds ownership of the idea by personnel in the corporation. The facilitator might help the contributors to phrase the ideas (still in the contributors words) more concisely. A sample might be the similar to Figure 2 below.

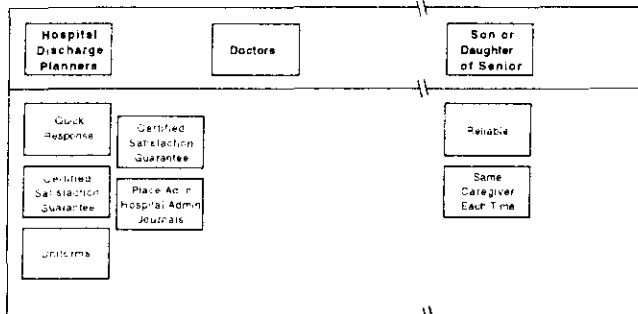
FIGURE 2



The team has brainstormed to determine the significant client categories. One keeps in mind Prado's 80/20 rule that 80% of business comes from 20% of the clients. This is incentive to restrict the number of client categories in order to be effective.

The next stage (Figure 3) is to brainstorm to describe clients' expectations of the service. A sample result follows and since the blue Post-it Notes™ were used for headings, yellow is used for the brainstorming ideas.

FIGURE 3

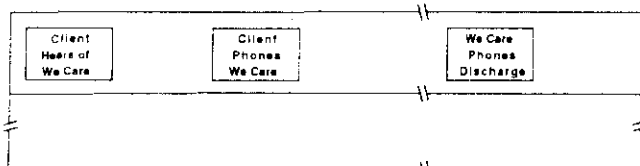


Members of the group will quickly come up with ideas in each client group. The facilitator asks each person to verbalize their idea, to write it down on a Post-it Notes™ and then asks an assistant to place it on the matrix. This process continues as ideas come randomly for all client categories. Remember that the purpose of brainstorming is to stimulate and capture ideas (the "no evaluation" rule applies; that is, no one is allowed to make negative comments such as, "it's too expensive"). The most outlandish and impractical ideas, if proposed in earnest, should be included in the matrix. Outrageous ideas from one person may generate practical ideas from another.

In the next step, pick a particular client that you wish to focus on. Let us, for the sake of simplicity, focus on a hospital discharge planner. The facilitator now works with the group on the transaction process sequence that the discharge planner goes through when getting service from the corporation, We Care Health Services, by partitioning the steps.

The facilitator attempts to determine the first contact or contacts that the client may make with the corporation using brainstorming with the team (Figure 4). The facilitator then determines the remaining steps in the transaction process leading to the final contact point.

FIGURE 4

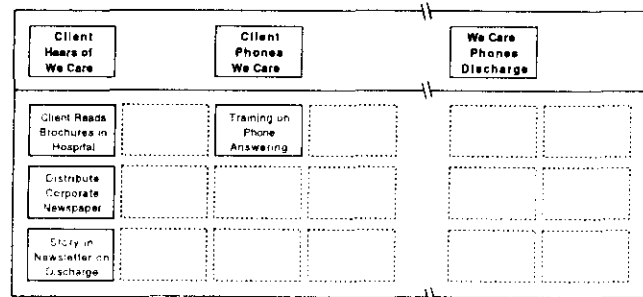


In the next stage in filling the matrix, the facilitator can brainstorm with the team to determine how the marketing plan or initiative can make clients aware of the services in each step of the process, and in fact can help the corporation to exceed customers' expectations. Once the marketers understand the business, it is often easy to say to the business, "if you only did this...and this, then we could focus on these things in the marketing campaign". For example, "If you could guarantee a one hour response (an expectation of the discharge planner) then the client would use you more extensively and recommend you to others." The corporation We Care instituted such a campaign as a result of this analysis.

Again, the header 3" x 5" Post-it Notes™ in the matrix are blue, and the next brainstorming steps placed on Post-it Notes™ in columns are in yellow.

As the session proceeds, the participants are asked how awareness of the services can be enhanced in each step of the process and how clients' expectations might be exceeded (which may lead to a new marketing campaign or perhaps a new addition to the services offered). A portion of the brainstorming results are presented in the table in Figure 5.

FIGURE 5



In column one, as the brainstorming proceeds (Matthews, 1992) for each step in the transaction process, new ideas are derived that can become part of the marketing plan. These ideas are said aloud by the respondent (the facilitator validates the suggestion in a positive way since some contributions may be rejected), written down by the respondent on the 3" x 5" Post-it Notes™, and then placed on the matrix.

Once this step is completed, the members of the marketing team have a clear understanding of the business, of the clients that use the business, of the clients needs and expectations and of some traditional and innovative ways that the corporation might make these

clients aware of the company's services. The process described above enhances the creative process since the participants are forced to examine every interaction of the corporation with the client and how that contact can be improved through marketing ideas that have been derived in this brainstorming process, and through enhanced communication with all members of the team arriving at results. This step may be repeated with the other clients defined in Step 1. Common strategies are often identified in response to the varied clients.

The marketing leader (or marketing team) can now complete the final step of the process by creating a mind map of the marketing plan. The creation of a mind map is clearly described in McMaster and Chyzik (1995).

At the centre of this particular map might be a micro-marketing initiative such as a marketing campaign to discharge planners. Since many of the diverse clients may have the brainstorming Step 2 performed on them, a macro marketing plan may be derived as a result of examining the many client types. Recall that the creation of a mind map (McMaster and Chyzik 1995) is an effective brainstorming methodology, and as the marketing plan is synthesized into one strategy,

new ideas and results may arise because of the associative power of the mind map.

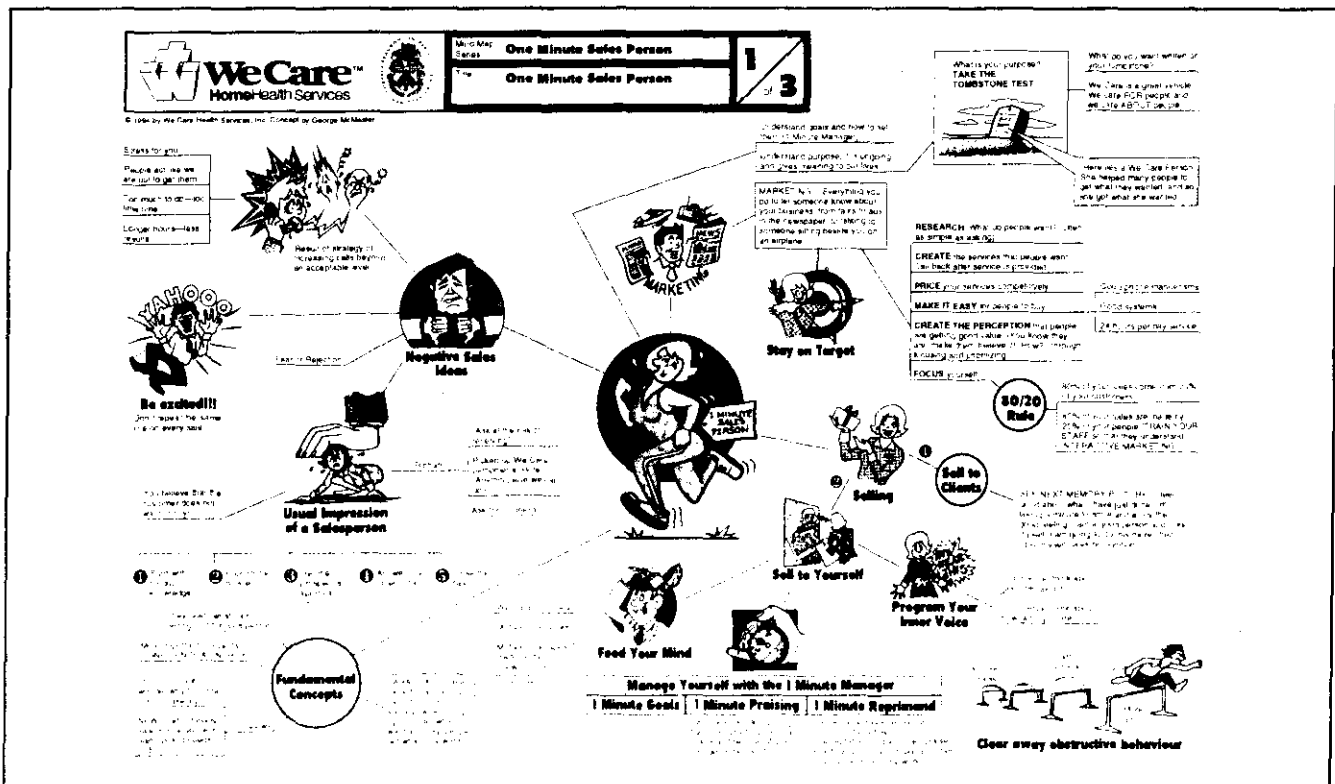
To illustrate what the resulting mind map might resemble, please see Figures 6, 7 and 8. These maps summarize the One Minute Sales Person (Blanchard et al 1986) and show the variety of techniques that may be used.

In Figure 6, the centre icon and text states the heart of the concept, "The one minute sales person". The map is read in a clockwise manner starting at 12 o'clock. The primary concept is placed at the centre of the map, and in our case study, this would be replaced by "marketing strategy to the discharge planner". Secondary concepts are drawn exiting from the primary one. In Figure 6, they are: "understanding purpose"; "marketing"; and what it is; "selling" concepts; "fundamental concepts"; and finally "negative sales ideas".

Figure 7 illustrates not only secondary ideas in the "one minute review", but a tertiary idea, "weigh the advantages" and a fourth idea "the best weight, sell feelings".

In Figure 8, the key concept is "following up on sales". The secondary ideas are: "asking for referrals"; "a

**FIGURE 6: Mind Map of The One Minute Sales Person (Blanchard and Spencer, 1986) — Part 1**



script for follow-up calls", "keeping your goal in mind", "call back story"; and what to do if "bad news" is derived as a result of a call back.

to look like given all the information that has been generated using the process described here?"

Some of the advantages of this final presentation of the marketing plan in mind map form are:

- (a) It has synthesized a lot of material into a few pages (Buzan 1989).
- (b) Ideas are put into categories making it easier to group ideas.
- (c) Brainstorming continues since all members of the team can see all of the concepts quickly on the page and the ability to think of new ideas is thus enhanced.
- (d) It lends itself to communicating concepts to others so that you may quickly review key concepts with the people for whom you are creating the marketing plan.

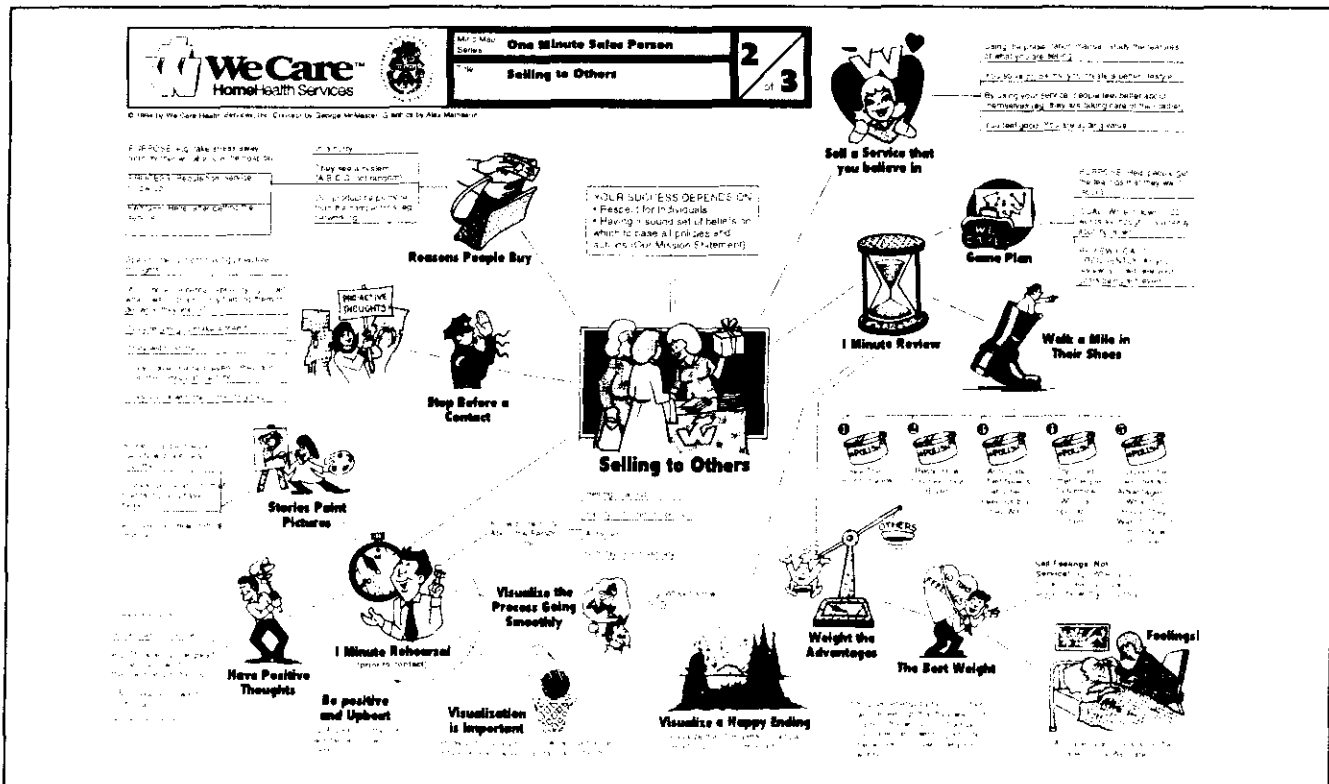
### CONCLUSION

It is our experience that many marketing firms do not understand the business for which they are presenting and creating materials. This paper has innovated systems analysis tools so that the marketer can now take these tools and use them to interact with their clients in a productive way. They learn about the system and they involve their client in a brainstorming manner during this analysis to come up with a strategy. The participation of the client using this process is very important since it will create loyalty to the strategy that results and the client will take ownership of the campaign that is derived.

A final point about the three maps describing the activities and concepts of a "One Minute Sales Person" is the extensive use of iconization. This term is simply used to describe the act of summarizing a concept in the form of a picture. Creating these icons enhances creativity, memory and communication and leads to ideas for an advertising strategy. That is, "what do you wish your ad

It is also our experience that many marketers, when not using the algorithm described herein, often initially hears from the client, "let me give you the background on our business to show how different and unique it is: greater competitive pressure, higher and different customer expectations, and lower employee morale". All businesses think that they are unique. The methodology described here, focuses the interaction between

FIGURE 7: Mind Map of The One Minute Sales Person (Blanchard and Spencer, 1986) — Part 2



the marketer and the client in a positive way. When the methodology described in this paper is repeatedly used by the marketer, each application will get easier and a commonality will emerge. Most businesses are not that unique. The creative ideas for marketing the business will often come from the users that you are working with using this methodology.

It was also our experience that computer science and marketing students who performed a systems analysis on a business, and were taught this methodology, could offer richer advice to the businesses that they were working for, hence increasing the desire of the user to spend time that they consider to be precious to participate in the analysis phase.

Marketing consultants and marketing curricula seem to be telling you (Putnam, 1990): "The solution to your problem is clear. Become a marketer." But that advice may seem about as useful as the advice an owl once gave a grasshopper!

A weary grasshopper had come to the owl for counsel. "Oh wise one, I despair of this constant struggle! I work all day, from spring through fall, just to lay in enough

food to barely survive the winter. How can I get ahead?"

The owl blinked and nodded, "I see your problem, and the solution is clear. You must become a cricket."

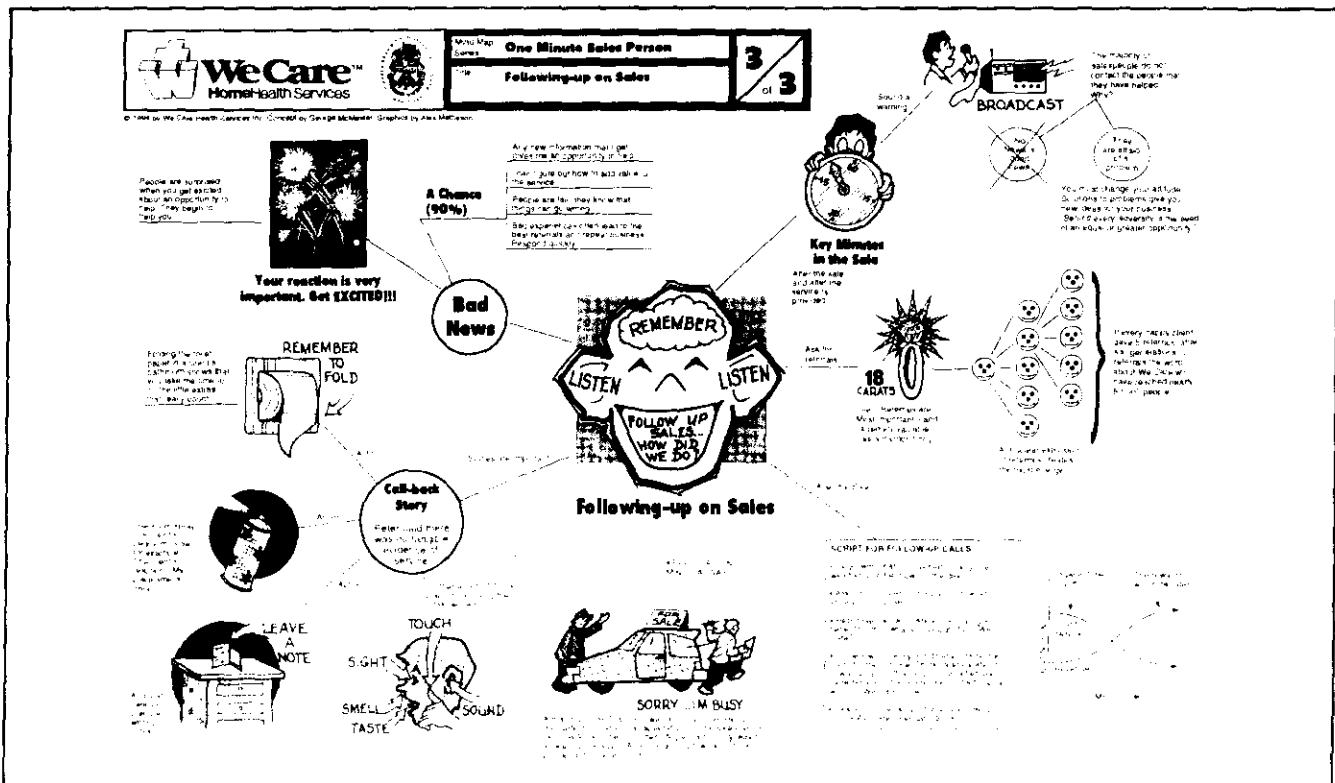
"But why, oh wise one?"

"The cricket does not waste his time as you do. He eats what he needs, makes music when he likes, and when the cold weather comes he crawls into a snug hole and hibernates. Become a cricket, my son, and your days will be bright and joyful."

The grasshopper was ecstatic, contemplating his coming good fortune. He thanked the owl and began to hop happily away. A small doubt struck him however, and he turned back. "Oh wise one, just one last thing. Exactly how does one become a cricket when one starts as a grasshopper?"

The owl blinked in dismissal. "I have given you the marketing strategy. The details are up to you." We believe that both a marketing strategy and the details of that marketing strategy have been presented here, to optimize the results of the marketing effort.

FIGURE 8: Mind Map of The One Minute Sales Person (Blanchard and Spencer, 1986) — Part 3



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